

# Simplifying EVV

April 18, 2023

2:00 pm – 3:00 pm

Hosted by:

The Ohio Department of Medicaid (ODM) & Sandata Technologies

# Welcome!

**How many cups of coffee do you prefer in a day?**

Use the QUESTION & ANSWER box to participate!

- A. I do not drink coffee
- B. One cup
- C. Two cups
- D. Three or more cups



## Sound Test



**We are testing sound at this time.**

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

# Intended Audience

This presentation is intended for:

- » Agency providers
- » Independent providers
- » Alternate EVV vendors
- » EVV oversight entities
- » Payers and their staff
- » Any interested EVV stakeholders



## Topics Covered Today



- EVV Background
- Auto-Verification
- Have the Right Visit Capture Tools
- Use Data to Look for Patterns
- Resources

Individuals receiving services subject to EVV are referred to as recipients. The EVV system uses the term client.

# EVV Background

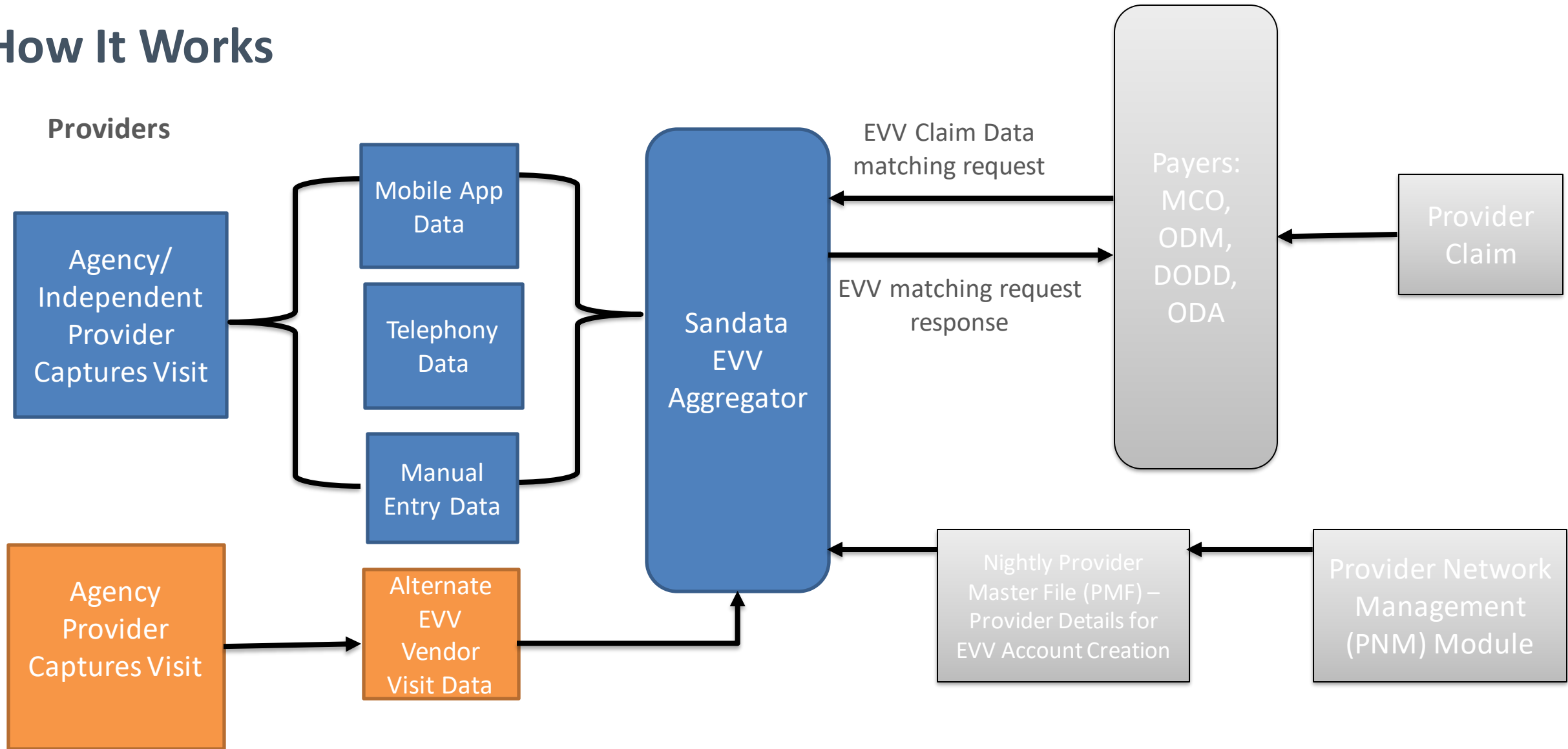


Why?

## Background

- December 2016, Congress passed the 21st Century Cures Act requiring state Medicaid programs to implement an EVV system for certain home and community-based services. [Section 12006\(a\) of the 21st Century Cures Act](#)
- January 8, 2018, ODM began using an EVV system and implemented EVV policy in [Ohio Administrative Code Rule 5160-1-40 | Electronic visit verification \(EVV\)](#).

# How It Works

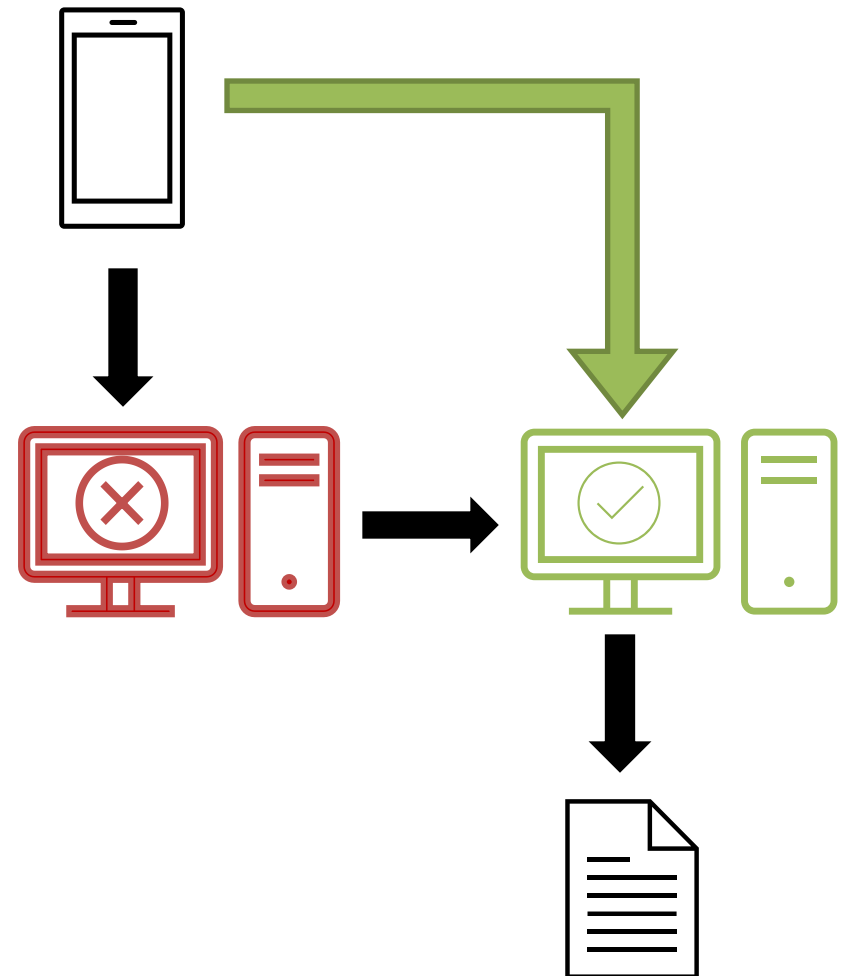




# What is Auto-Verification?

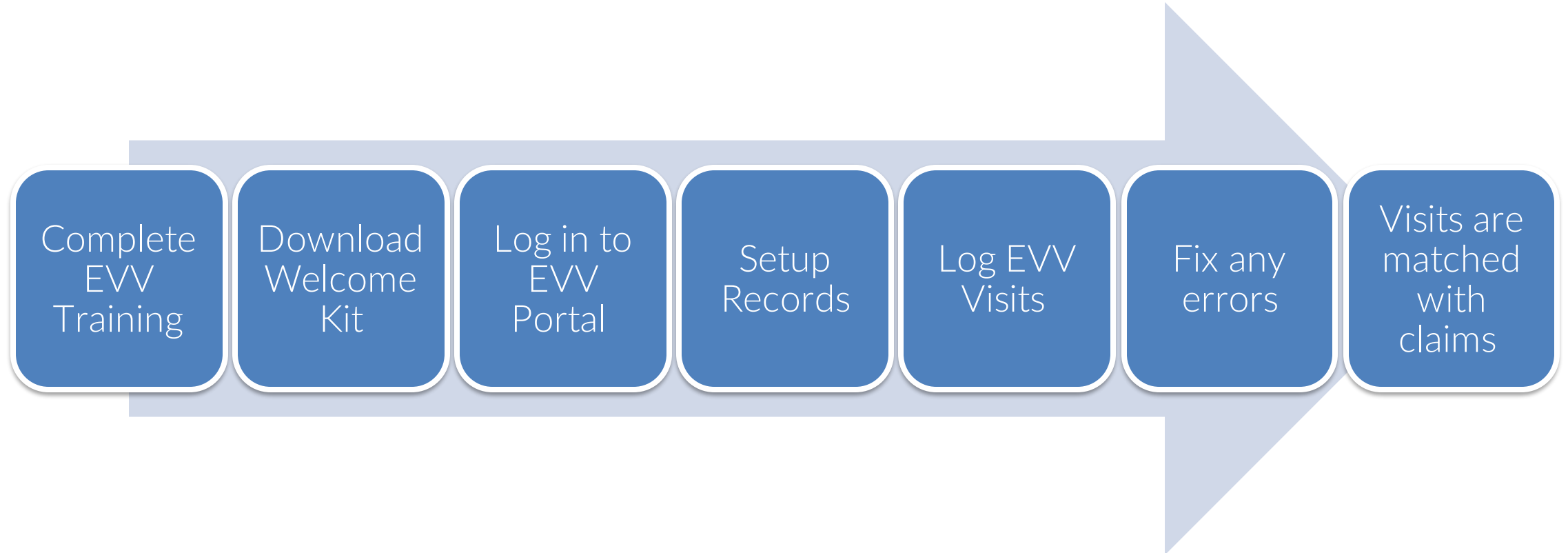
## Auto-Verification Definition

- A visit that is captured with **no** missing or inaccurate information.
- More auto-verified visits, means:
  - » Less EVV maintenance time
  - » Increased claims matching rates
  - » Better EVV compliance



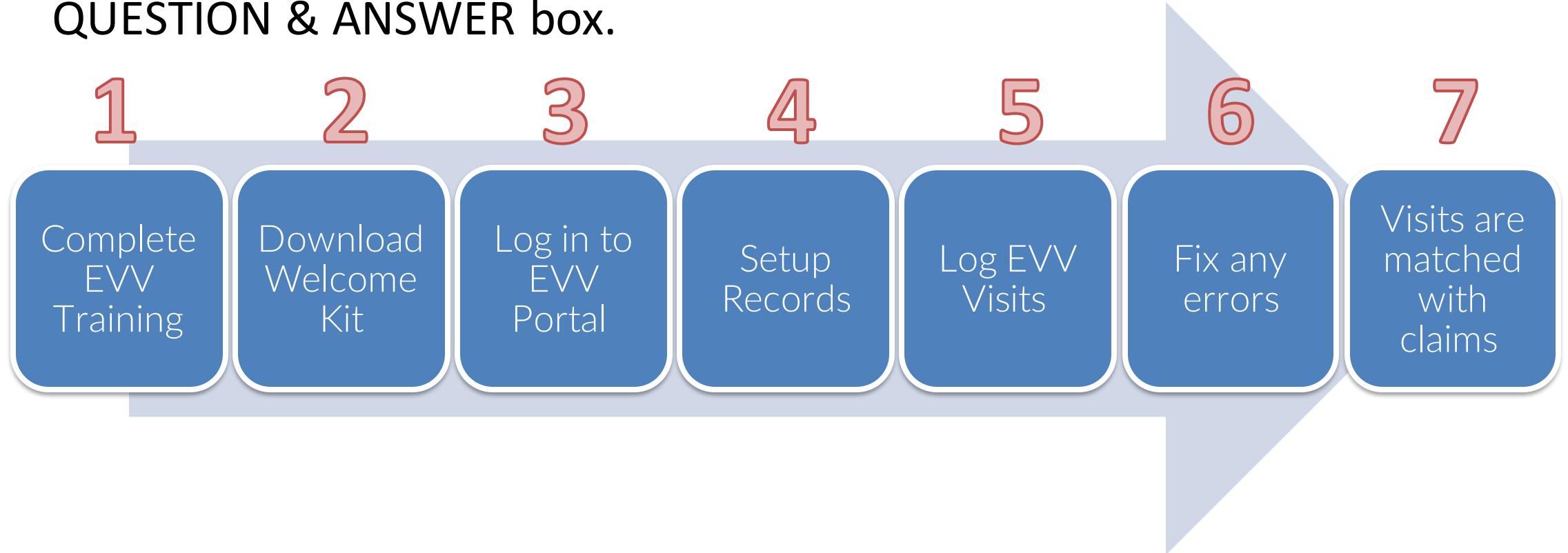
## EVV Workflow

This is the EVV process from start to finish.

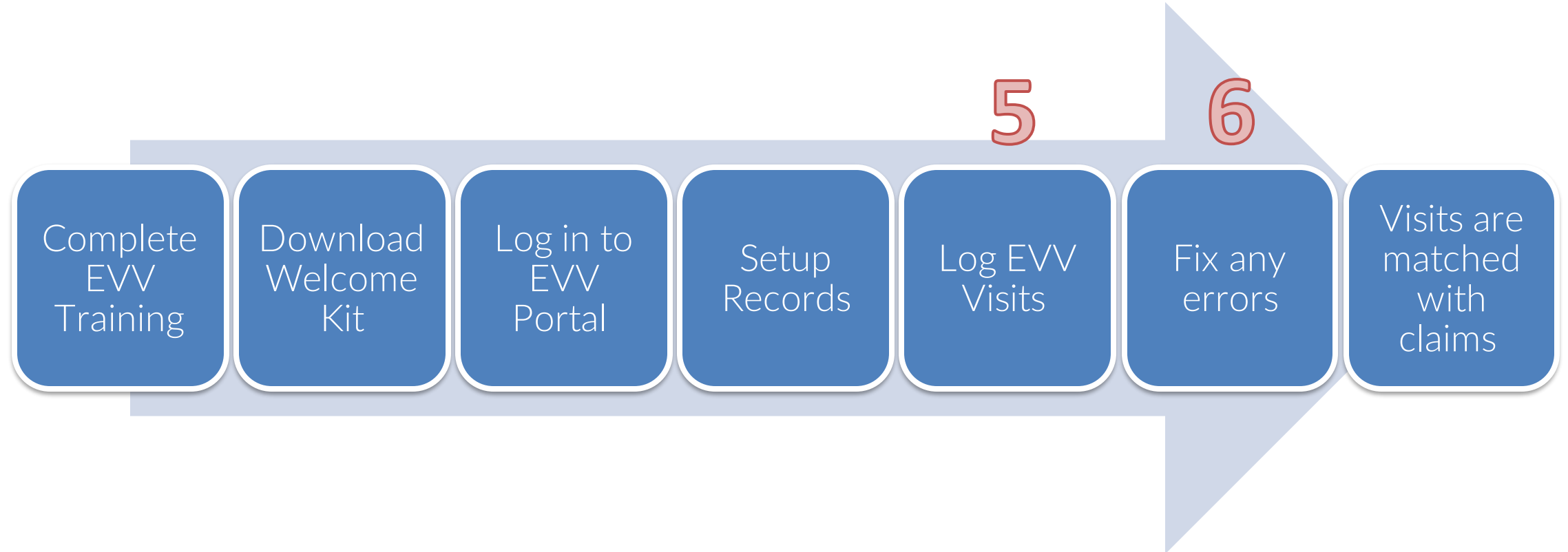


## Poll Question

Which bubbles below do you think contain the biggest roadblocks to recording auto-verified visits? Submit your thoughts using the QUESTION & ANSWER box.

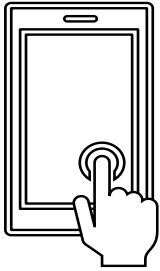


## Common Roadblocks



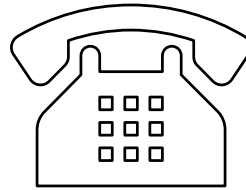
# Have the Right Visit Capture Tools

## Visit Capture Methods



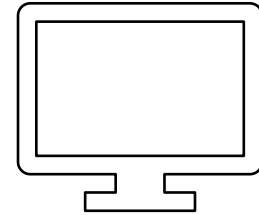
### Sandata Mobile Connect (SMC)

- Download the app onto a personal phone or tablet, OR,
- Request a device that includes the app



### Telephony

- Dial an automated line and answer questions to record a visit



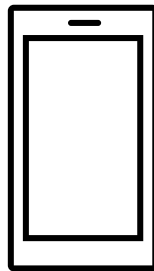
### Manual Entry

- Enter the visit details into the EVV portal
- Only for agency staff and independent providers

# Visit Capture Tools

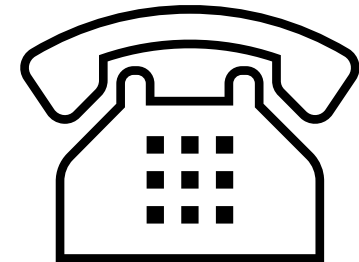
## Sandata Mobile Connect (SMC)

- Login Information
  - Company ID
  - Email
  - Password
- Client ID Number or Medicaid ID Number



## Telephony

- Toll Free Number
- Employee Santrax ID
- Client ID Number
- [Service ID](#)



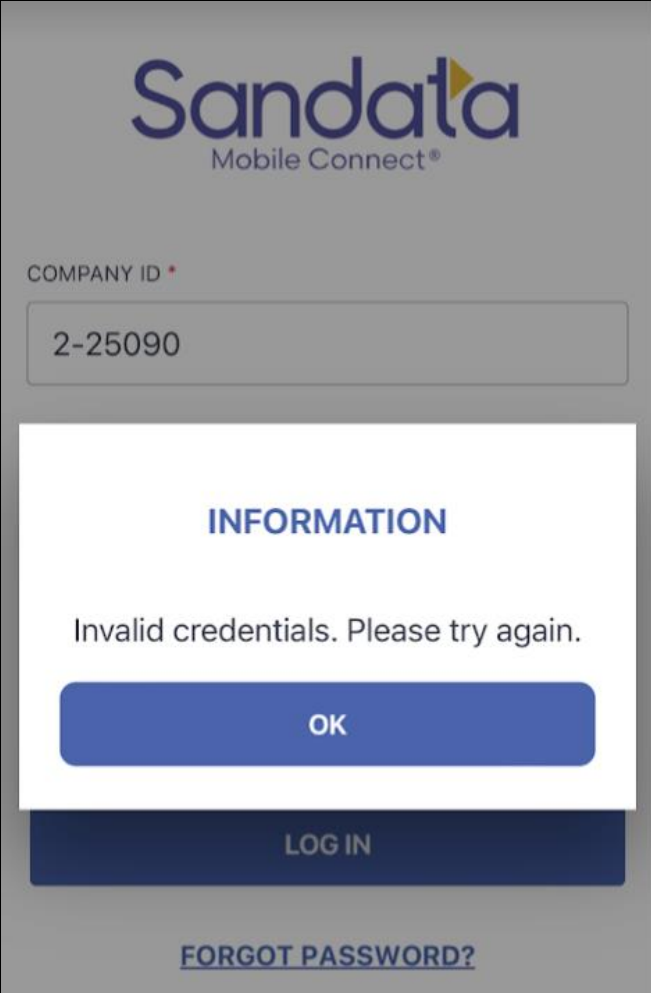


## Roadblock: "Invalid Credentials"

### SMC Login Issues:

- The Company ID is incorrect
- The Username is incorrect
- The password is incorrect or
- Credentials are not enabled for the employee\*

\*Agencies only



The screenshot shows the Sandata Mobile Connect login interface. At the top is the Sandata logo with the tagline 'Mobile Connect®'. Below the logo is a 'COMPANY ID' field with a red asterisk, containing the text '2-25090'. A white modal box is centered on the screen with the title 'INFORMATION' in blue. The message inside the modal reads 'Invalid credentials. Please try again.' Below the message is a blue 'OK' button. At the bottom of the login screen is a dark blue 'LOG IN' button and a link for 'FORGOT PASSWORD?'.

## Solution: Have the Right Tools

### Agency Providers

- Company ID = 2-Agency Number  
» Example, STX**12345** -> 2-**12345**
- Username = email
- Password = sent directly to user

### Independent Providers

- Company ID = 2-10086
- Username = email
- Password = sent directly to user

If you plan to log visits via the **Sandata Mobile Connect (SMC)** application, your username and password are:

- Company ID: 10086
- Username: DEMO@MAILER.COM
- Temporary Password: @C2V464d8x3Q

### Employment

DEPARTMENT  
Select Depa... ▼

DISCIPLINE  
Select Disci... ▼

EMPLOYEE CUSTOM ID  
Enter Employee€

PAY RATE  
Enter Pay Rate

HIRE DATE MM/DD/YYYY  
Select Hire Date 📅

TO DATE MM/DD/YYYY  
Select To Date 📅

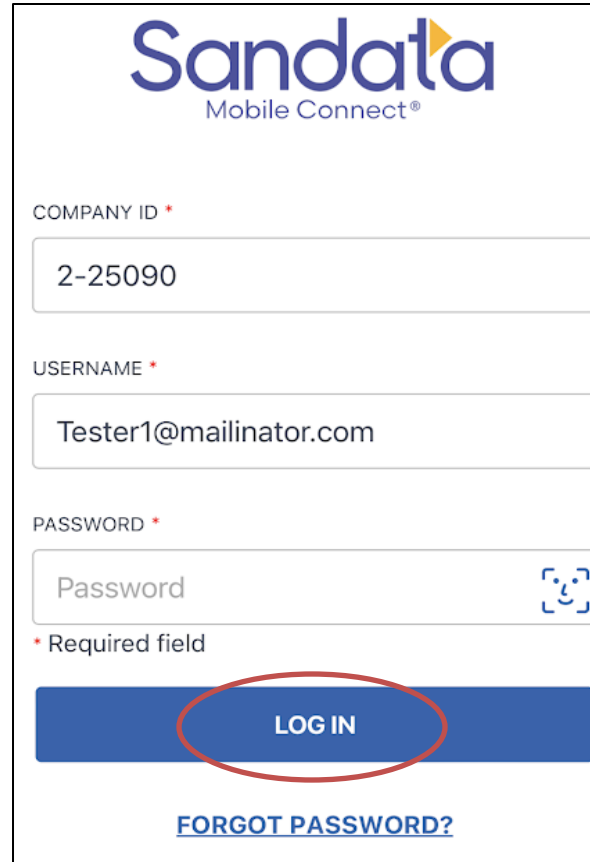
☐ MOBILE USER

☒ MOBILE USER

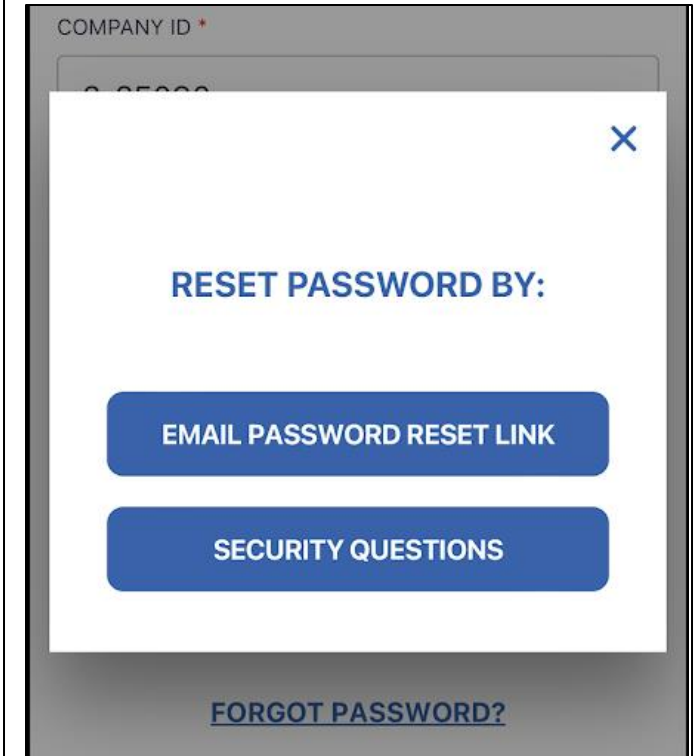
## Solution: Reset Your SMC Password

You can reset your own SMC password, if you have your company ID and email.

1. Enter the company ID
2. Enter your email
3. Click "Forgot Password"
4. Choose to receive an email, or answer security questions

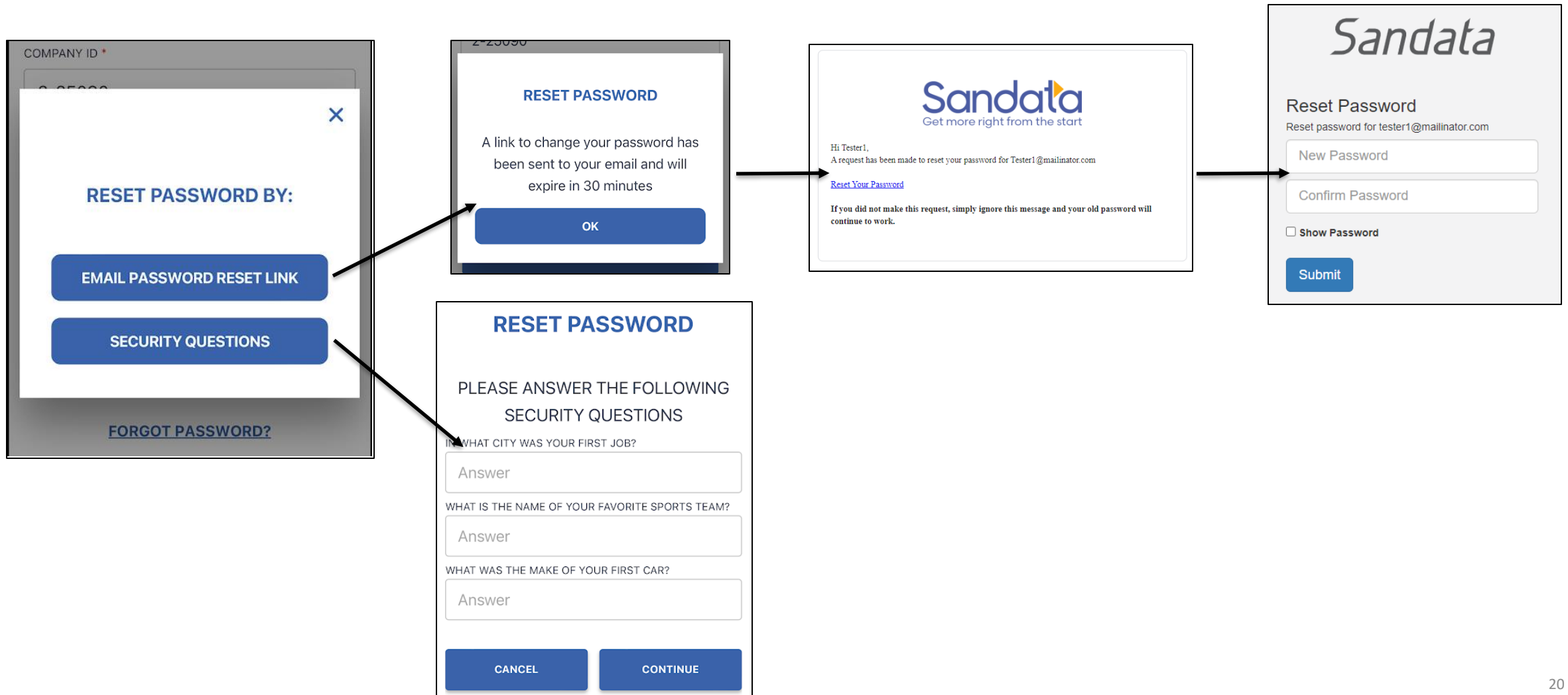


The image shows the Sandata Mobile Connect login interface. At the top is the Sandata logo with the tagline 'Mobile Connect®'. Below the logo are three input fields: 'COMPANY ID \*' with the value '2-25090', 'USERNAME \*' with the value 'Tester1@mailinator.com', and 'PASSWORD \*' with the placeholder text 'Password'. A red asterisk indicates that the password field is required. To the right of the password field is a small icon of a person with a plus sign. Below the input fields is a blue button labeled 'LOG IN', which is circled in red. At the bottom of the form is a blue link labeled 'FORGOT PASSWORD?'.



The image shows a 'RESET PASSWORD BY:' dialog box. It has a close button (X) in the top right corner. Below the title are two blue buttons: 'EMAIL PASSWORD RESET LINK' and 'SECURITY QUESTIONS'. At the bottom of the dialog box is a blue link labeled 'FORGOT PASSWORD?'.

# Solution: Reset Your SMC Password



# Use Data to Look for Patterns

## Look for Patterns!

- While it is important to correct exceptions, it is also helpful to **look for patterns** in the EVV data.
- Fixing the root cause of an issue greatly reduces the amount of work on future visits. It also increases your auto-verification rate.



# Identifying Patterns

Visit Maintenance

Visit Maintenance / Manage Visits

Select a Visit

CREATE CALL

\* indicates required field

DATE RANGE \* MM/DD/YYYY

12/01/2021

to

12/31/2021

CLIENT

Enter Client

EMPLOYEE

Enter Employee

PAYER

Select Payer

PROGRAM

Select Program

SERVICE

Select Service

CATEGORY

Select Category

VISIT STATUS

Select Visit Status

CLIENT MEDICAID ID

Enter Client Medicaid ID

FILTER VISITS BY

All Visits

# Identifying Patterns

| Client Name      | Employee Name   | Service                              | Visit Date | Call In  | Call Out | Call Hours | Adjusted In | Adjusted Out |
|------------------|-----------------|--------------------------------------|------------|----------|----------|------------|-------------|--------------|
| Grayson, Richard | Employee, Maria | RN Assessment (T1001)                | 12/21/2021 | 09:32 PM | 09:34 PM | 00:02      | 09:32 PM    | 09:34 PM     |
| Grayson, Richard | Employee, Maria | MyCare - HCA (S5125)                 | 12/21/2021 | 09:27 PM | 09:30 PM | 00:03      | 09:27 PM    | 09:30 PM     |
| Grayson, Richard | Employee, Maria | MyCare - Waiver Choices HCAS (T2025) | 12/21/2021 | 09:16 PM | 09:24 PM | 00:08      | 09:16 PM    | 09:24 PM     |



## Identifying Patterns – Examples

- "All of my visits have an unauthorized service exception, even though I am selecting the service during the visit. Why I am seeing this exception?"
- "I am using SMC to call in and call out. I see now that none of my visits in EVV have a client name. Where is the client information I entered during the visit?"
- "I am being told my claims aren't supported by EVV, but I see the visits. Why are the claims and visits not matching?"











## Example: Unauthorized Service Exception

"All of my visits have an unauthorized service exception, even though I am selecting the service during the visit. Why am I seeing this exception?"

| Client Name ▲   | Employee Name ◆ | Service ◆  |
|-----------------|-----------------|--|
| Five, Test      | Thomas, Jackson | OHCW Nsg - LPN (T1003)<br>●                      |
| Five, Test      | Thomas, Jackson | HPC<br>●   |
| Five, Test      | Smith, John     | Speech Language Pathology Therapies (G0153)<br>● |
| gilmores, happy | Thomas, Jackson | OHCW Nsg - LPN (T1003)<br>●                      |
| gilmores, happy | Thomas, Jackson | SPHH Nsg - LPN (G0300)<br>●                      |

## Client Payers and Visits

- Unauthorized exceptions are services on the visit that do not match the client record.











| FROM DATE  | TO DATE | CLIENT PAYER ID | PAYER      | PROGRAM | SERVICE                                      | ACTIONS   |
|------------|---------|-----------------|------------|---------|--|---|
| 01/01/2019 |         |                 | CareSource | SP      | SPHH Nsg - LPN (G0300)                       |   |
| 01/01/2019 |         |                 | DODD       | DD      | HPC  |   |
| 02/01/2020 |         |                 | DODD       | PDHPC   | Participant-Directed Homemaker-Personal Care |   |
| 01/01/2019 |         |                 | DODD       | DD      | IO NSG - RN (T1002)                          |   |
| 01/01/2019 |         |                 | ODM        | SP      | SPHH Nsg - LPN (G0300)                       |   |

| Client Name | Employee Name   | Service                | Visit Date |
|-------------|-----------------|------------------------|------------|
| Five, Test  | Thomas, Jackson | OHCW Nsg - LPN (T1003) | 09/04/2020 |

- EVV uses the client record to determine if a service matches a visit.
- First, enter the payer, program, and service in the client record, then log your visits.
- The visit must be recorded within the allowed dates on the client record.

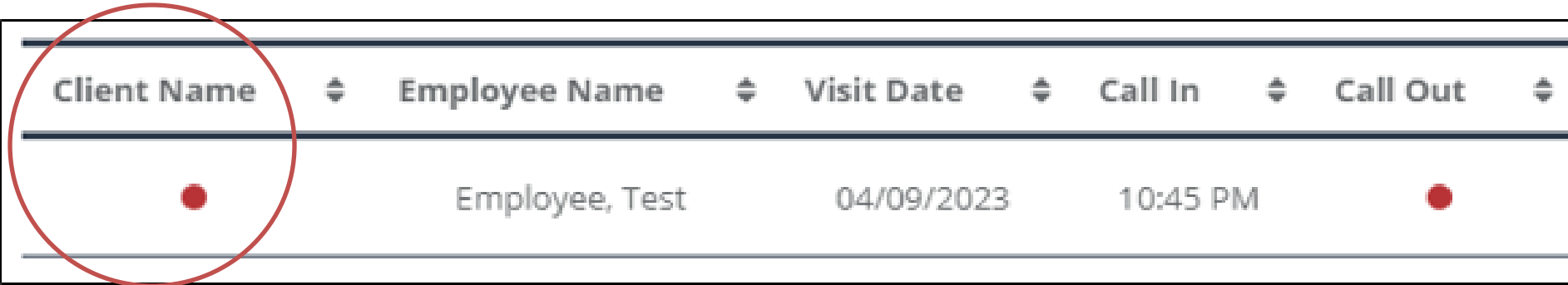
## Fixing the Pattern

- Keep payer details current
- Telephony only: know the correct service ID
  - » [Agency Service ID List](#)
  - » [Non-Agency Service ID List](#)

| FROM DATE  | TO DATE | CLIENT PAYER ID | PAYER      | PROGRAM | SERVICE                                      | ACTIONS   |
|------------|---------|-----------------|------------|---------|--|---|
| 01/01/2019 |         |                 | CareSource | SP      | SPHH Nsg - LPN (G0300)                       |       |
| 01/01/2019 |         |                 | DODD       | DD      | HPC  |       |
| 02/01/2020 |         |                 | DODD       | PDHPC   | Participant-Directed Homemaker-Personal Care |     |
| 01/01/2019 |         |                 | DODD       | DD      | IO NSG - RN (T1002)                          |   |
| 01/01/2019 |         |                 | ODM        | SP      | SPHH Nsg - LPN (G0300)                       |   |

## Example: No Client Records

"I am using SMC to call in and call out, but none of my recorded visits have a client name in EVV. Where is the client information I entered during the visit?"



A screenshot of a table with five columns: Client Name, Employee Name, Visit Date, Call In, and Call Out. Each column has a double-headed arrow icon to its right. The first row of data shows a red dot in the Client Name column, the text 'Employee, Test' in the Employee Name column, the date '04/09/2023' in the Visit Date column, the time '10:45 PM' in the Call In column, and a red dot in the Call Out column. A red circle is drawn around the red dot in the Client Name column.

| Client Name | Employee Name  | Visit Date | Call In  | Call Out |
|-------------|----------------|------------|----------|----------|
|             | Employee, Test | 04/09/2023 | 10:45 PM |          |

# Unknown Visits

When an SMC visit is recorded without a client ID or client Medicaid ID, the name is entered as a 'memo' in EVV Visit Maintenance.

### Start Unknown Visit

Please enter the client's name before continuing

FIRST NAME \*

Test

LAST NAME \*

Client

MEDICAID ID #

CLIENT ID #

✓

CLIENT ID #

\* Required field

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

MEMO

Enter Memo

1024 characters remaining.

SAVE

UNKNOWN VISIT DETAILS

LAST NAME: CLIENT

FIRST NAME: TEST

MEDICAID ID #: MEDICAIDID:

CLIENT ID #: CLIENTID:

30

## Fixing the Pattern

1. The client record must be active in EVV, and
2. The visit must use the same client ID or client Medicaid ID that is in that record.

| Last Name | First Name | Client ID | Client Medicaid ID | Status |
|-----------|------------|-----------|--------------------|--------|
| Client    | Test       | 528671    | 909121909121       | Active |

Basic

\* indicates required field

FIRST NAME \*

CLIENT ID \*

Enter Client Identifier

SEARCH CLIENT

## Example: Visits Do Not Match Claims

"I am being told my claims aren't supported by EVV, but I see the visits.  
Why are the claims and visits not matching?"

| Client Name      | Employee Name   | Visit Date | Call In  | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Bill Hours | Visit Status |
|------------------|-----------------|------------|----------|----------|------------|-------------|--------------|----------------|------------|--------------|
| Snyder, Kristine | Pena, Paloma    | 12/01/2020 | 01:00 AM | 04:00 AM | 03:00      | 01:00 AM    | 04:00 AM     |                | 03:00      | Verified     |
| Snyder, Kristine | Smith, John     | 11/30/2020 | 03:29 PM | 03:37 PM | 00:08      | 03:29 PM    | 03:37 PM     |                | 00:08      | Verified     |
| gilmores, happy  | Smith, John     | 11/23/2020 | 04:48 PM | 06:05 PM | 01:17      | 04:48 PM    | 06:05 PM     |                | 01:17      | Verified     |
| Snyder, Kristine | Andrea, Test    | 10/27/2020 | 01:00 AM | 01:59 AM | 00:59      | 01:00 AM    | 01:59 AM     |                | 00:59      | Verified     |
| Snyder, Kristine | Andrea, Test    | 10/27/2020 | 01:00 AM | 01:52 AM | 00:52      | 01:00 AM    | 01:52 AM     |                | 00:52      | Verified     |
| Snyder, Kristine | Thomas, Jackson | 09/08/2020 | 01:00 AM | 05:00 AM | 04:00      | 01:00 AM    | 05:00 AM     |                | 04:00      | Verified     |
| Five, Test       | Smith, John     | 09/04/2020 | 04:50 PM | 04:51 PM | 00:01      | 04:50 PM    | 04:51 PM     |                | 00:01      | Verified     |
| Jenkins, Peter   | Thomas, Jackson | 09/04/2020 | 12:37 PM | 12:47 PM | 00:10      | 12:37 PM    | 12:47 PM     |                | 00:10      | Verified     |
| Snyder, Kristine | Thomas, Jackson | 09/04/2020 | 12:26 PM | 12:28 PM | 00:02      | 12:26 PM    | 12:28 PM     |                | 00:02      | Verified     |
| Snyder, Kristine | Thomas, Jackson | 09/04/2020 | 12:05 PM | 12:08 PM | 00:03      | 12:05 PM    | 12:08 PM     |                | 00:03      | Verified     |



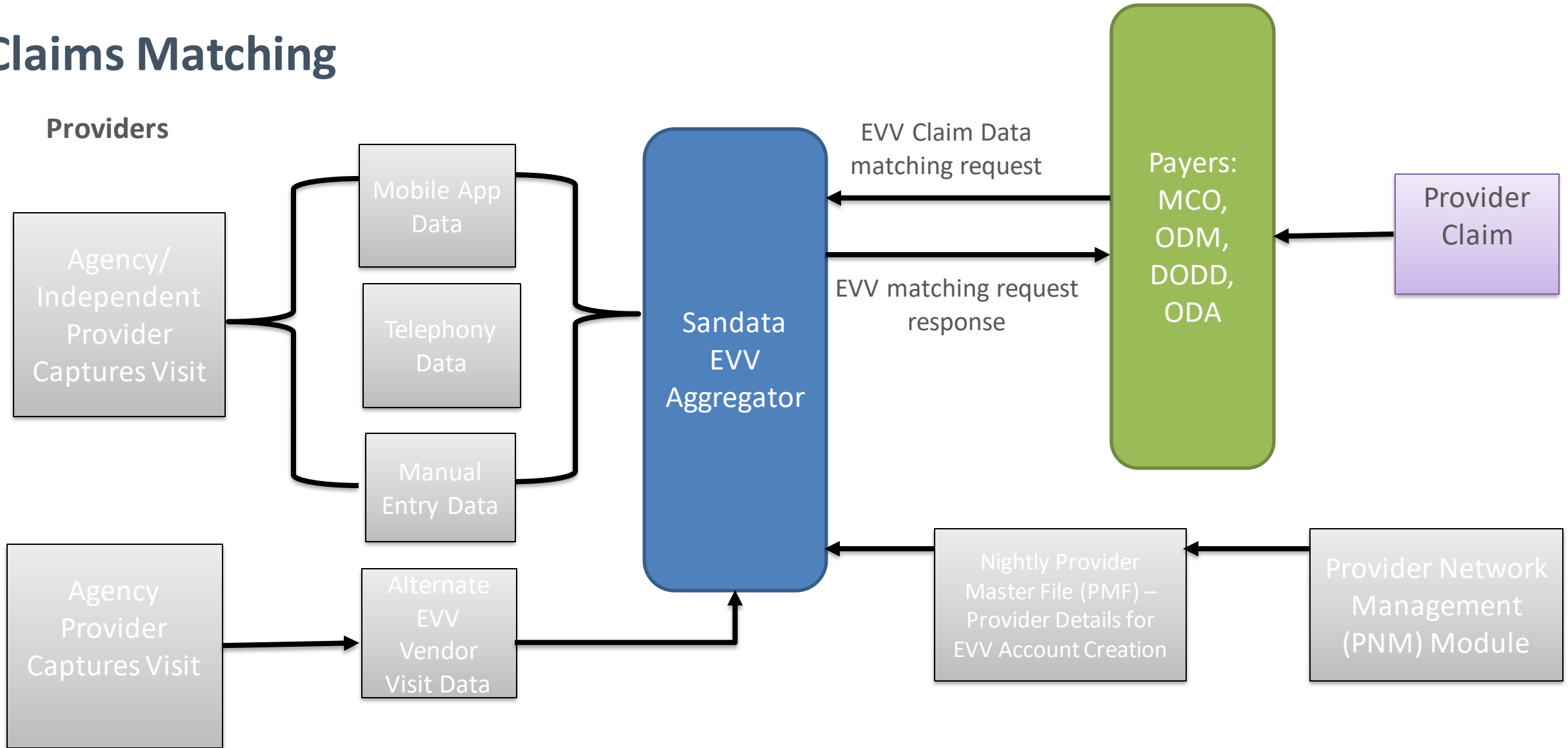
# Claims Matching

There are five details used to match an EVV visit to a claim:

- Recipient Medicaid ID Number
- Billing Provider Medicaid ID Number
- Date of Service
- Service Provided
- Units



# Claims Matching



## Comparing Claims to EVV Data

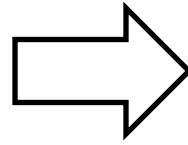
Use the Full Visit Export report to compare visit details to claims.

| Report Type | Report Name       | Content   | Use  |
|-------------|-------------------|---|--|
| Date Range  | Full Visit Export | Every available field that is captured for a visit, all in one place. | Evaluate EVV details for accuracy, such as the client payer, total units recorded, and visit status. |

| CLIENT_SIGNATURE_EXCEPTION | SERVICE_VERIFICATION_EXCEPTION | TOTAL_ORIGINAL_EXCEPTIONS | TOTAL_CURRENT_EXCEPTIONS | PROVIDER_ID |
|----------------------------|--------------------------------|---------------------------|--------------------------|-------------|
|                            |                                | 0                         | 0                        | 123456      |
|                            |                                | 0                         | 0                        | 123456      |
|                            |                                |                           |                          |             |

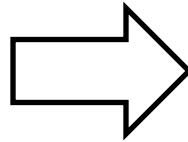
## Common Claims Matching Errors

There is no visit in EVV for the service date on the claim



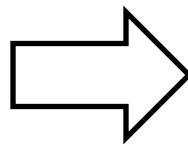
Fix the date of service on the claim or create a manual visit

There are exceptions on the visit in EVV (visit status is incomplete)



Fix exceptions

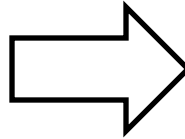
The Medicaid ID entered in the EVV system for the recipient does not match the claim



Fix the Medicaid ID number on the claim, or fix the Medicaid ID number in the client record

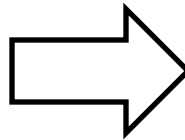
## Common Claims Matching Errors

The date of service on the claim does not match the date on the visit



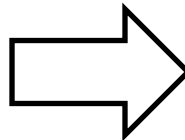
Fix the date on the claim or visit to match the correct date of service

The service code billed on the claim does not match the service on the visit



Fix the procedure code on the claim, or fix the service code on the visit and/or client record to match the correct service provided

The billed units are less than what the visit shows in EVV



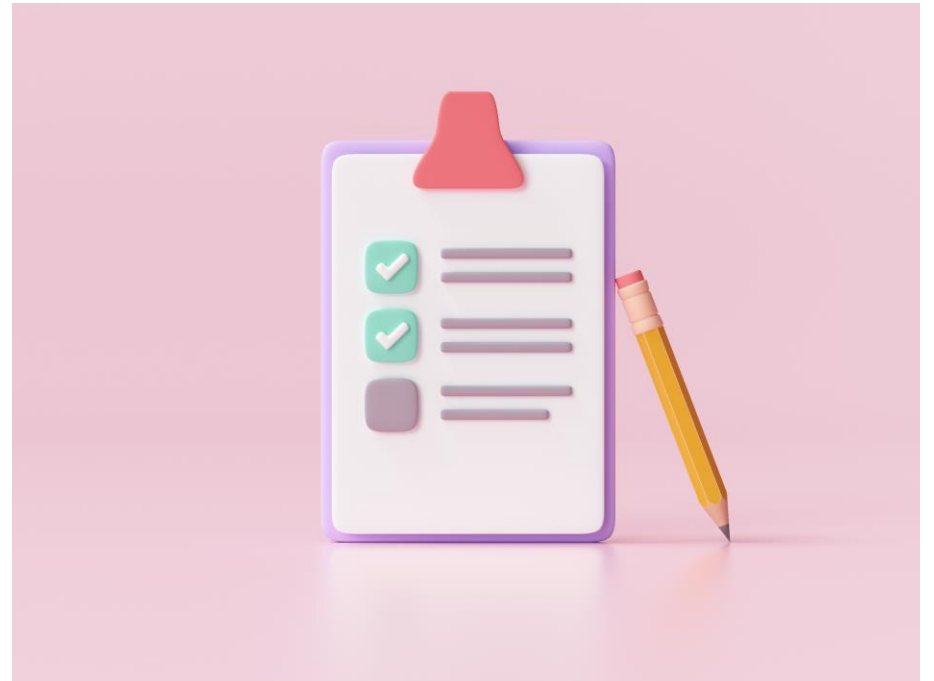
Fix the units on the claim or edit the call times on the visit to match the times when the visit happened

## Poll Question

We have reviewed many types of patterns that can occur in EVV.

» What is one pattern you have seen or learned about today?

Answer in the QUESTION & ANSWER box.



# Resources

# Help is available!

- [EVV Ask a Trainer Sessions](#)
  - » Speak with a Sandata trainer in a private Zoom call, and receive help with your EVV system
- [Monthly Webinar Series](#)
  - » Presenting solutions to EVV issues affecting the provider population
  - » Example: Increasing Auto Verification, Getting Started with EVV
- [EVV FAQ](#)
  - » Frequently Asked Questions





# EVV Contacts

| Contacts   | Types of Questions Fielded   |
|--|--|
| <b>Sandata EVV Provider Hotline</b><br><a href="mailto:ODMCustomerCareEmail@sandata.com">ODMCustomerCareEmail@sandata.com</a><br>855-805-3505<br>Hours of Operation:<br>Mon-Fri, 7am-8pm, Sat-Sun, 9am-5pm | <ul style="list-style-type: none"> <li>▪ Sandata technical questions</li> <li>▪ Device Help</li> <li>▪ Getting Started with EVV</li> <li>▪ EVV Visit Maintenance</li> </ul>                            |
| <b>ODM EVV Team</b><br><a href="mailto:ODMEVV@sandata.com">ODMEVV@sandata.com</a><br>614-705-1082  | <ul style="list-style-type: none"> <li>▪ EVV policy questions</li> <li>▪ Services subject to EVV</li> <li>▪ EVV and claims matching logic</li> <li>▪ Alternate EVV requirements</li> </ul>             |
| <b>ODM Provider Integrated HelpDesk</b><br>800-686-1516  | <ul style="list-style-type: none"> <li>▪ Questions on account in PNM</li> <li>▪ Billing questions</li> <li>▪ Identify provider Medicaid provider ID</li> <li>▪ Updating contact information</li> </ul> |
| <b>Medicaid Fraud</b><br><a href="mailto:medicaidfraud@medicaid.ohio.gov">medicaidfraud@medicaid.ohio.gov</a><br>800-282-0514  | <ul style="list-style-type: none"> <li>▪ To report suspected or potential Medicaid fraud and abuse</li> </ul>  |

# Payer Contacts for EVV

| Payer   | Department                 | Contact Information   |
|---|----------------------------|---|
| Aetna   | Provider Relations         | 1-855-364-0974  |
| AmeriHealth                                     | Provider Relations         | 1-833-296-2259  |
| Anthem  | Provider Relations         | 1-800-462-3589  |
| Buckeye   | Provider Relations         | 1-866-246-4358  |
| CareSource                                      | Provider Relations         | 1-800-488-0134  |
| Department of Developmental Disabilities (DODD) |                            | 1-800-617-6733  |
| Humana  | Provider Relations         | 1-877-856-5707  |
| Molina  | Provider Relations         | 1-855-322-4079  |
| Ohio Department of Aging (ODA)                  |                            | <a href="mailto:Provider_Inquiry@age.Ohio.gov">Provider_Inquiry@age.Ohio.gov</a>            |
| Ohio Department of Medicaid (ODM)               | EVV<br>Integrated HelpDesk | <a href="mailto:ODMEVV@sandata.com">ODMEVV@sandata.com</a> ; 614-705-1082<br>1-800-686-1516 |
| United  | Provider Relations         | 1-800-600-9007  |

# EVV Helpful Resources

| Resource Title  | Description  |
|---|--|
| <a href="#">ODM EVV Fact Sheet</a><br><i>pdf document</i>         | One page summary of the EVV program for providers, agency staff, case managers, and others.  |
| <a href="#">ODM EVV page</a><br><i>Webpage</i>                    | The general ODM EVV webpage for providers and stakeholders.  |
| <a href="#">EVV Newsletters</a><br><i>Webpage</i>                 | Monthly EVV newsletters highlighting program changes/updates.<br><a href="#">Subscribe</a> to ODM EVV communications.  |
| <a href="#">EVV Webinars</a><br><i>Webpage</i>                    | The ODM EVV team hosts monthly webinars and post the recording and slides from each webinar. Upcoming and historical webinars can be found on the ODM EVV webpage. |
| <a href="#">EVV Tools and Helpful Documents</a><br><i>Webpage</i> | ODM webpage for helpful documents on the EVV program, Sandata system, telephony, devices, payor systems and Zendesk Sandata help desk portal.                      |

# EVV Helpful Resources

| Resource Title  | Description  |
|---|--|
| <a href="#">Programs and Procedure Codes Included in EVV</a><br><i>pdf document</i> | List of covered programs and services subject to EVV requirements, listed by payor.  |
| <a href="#">Time to Units Conversion</a><br><i>pdf document</i>                     | Time to units' conversion for EVV services, by payor.  |
| <a href="#">Sandata Help Desk Ticketing portal – Zendesk</a><br><i>Webpage</i>      | Helpdesk portal to access open and historical tickets submitted by users to Sandata and the ODM EVV team.                          |
| <a href="#">Reports in EVV and Aggregator</a><br><i>pdf document</i>                | List of all reports available in the Ohio Sandata EVV and Sandata Aggregator portal, with included fields and sample use cases.    |
| <a href="#">EVV Device Frequently Asked Questions</a><br><i>pdf document</i>        | A helpful device guide, that explains the similarities and differences between the EVV device and the Bring Your Own Device option |
| <a href="#">EVV General Frequently Asked Questions</a><br><i>pdf document</i>       | Questions from the provider community regarding policy, device orders and returns, getting started, and other EVV topics           |

# Common EVV Questions from this Webinar

# Common Questions

| Question  | Answer   |
|---|--|
| I am an Independent Provider, Do I need to use EVV? What if I live with the individual I serve? | All providers billing for services that require EVV, must use EVV. This includes providers who live with the individual receiving services. A full list of services in EVV can be found on the <a href="#">ODM EVV webpage</a> . |
| I provide Shared Living Service, do I need to use EVV?  | Shared Living Service is reimbursed at a daily rate and does not require EVV.  |
| Does Non-Medical Transportation (NMT) require EVV?  | NMT billed as NMT does not require EVV. If you are transporting the individual under a service that does require EVV, then you will need to use EVV for those transports.  |

# Common Questions

| Question  | Answer  |
|---|---|
| Can I use manual entry for EVV?   | The preferred method is by using an app that is downloaded onto the provider’s personal device, or a state-provided device shipped to the individual’s home. EVV visits may also be captured using a telephone by using a series of prompts. Lastly, a visit may be captured using a computer to manually enter the visit. When Individuals are enrolled on a waiver, the method of visit capture must be documented on the service plan. |
| When adjusting visits or creating a manual entry, what written documentation is acceptable? | Written documentation is any documentation that supports the change to the visit data or creation of the manual entry. This could be a paper timesheet or documented phone call.  |

# Common Questions

| Question   | Answer   |
|--|--|
| What if I run errands as part of my service and do these errands before I get to the residence or after I leave the residence? | We know Home and Community Based waiver services can be provided outside of the individual’s home. The location of service provision should be care planned. Your EVV visits should start and end when the billable service starts and ends. |
| Do we continue to submit our claims in MBS when we start using EVV?  | EVV is used to verify claims that are submitted to the various payers. Therefore, claims should continue to be submitted to MBS for DODD services. DODD will check EVV for visits matching the claims submitted.                             |
| I am a participant-directed provider who logs my hours through an app; do I also need to use EVV?                              | Yes. Logging your time through the GT Independence or Public Partnerships LLC is not the same as using EVV. All participant-directed services should be logged in EVV.   |